



Residential Sales Verification

Geocode  
Assessor Code  
Property Address  
Legal Description  
  
Sale Month/Year \_\_\_\_/\_\_\_\_  
Nbhd – Code \_\_\_\_\_

Return to:

The Department of Revenue shares Montana taxpayers' concerns about fair and equitable valuation of all property statewide. An important component of determining accurate market values is an analysis of property sales. This practice is consistent with the same technique used by fee appraisers.

We want to ensure that our information about the property sale referenced above is correct. Please assist us by completing this questionnaire and returning it to us within ten (10) days using the envelope provided. **This information will be considered confidential.**

An appraiser from our office will visit your property to verify property record data and sales information. If you have any questions, please call your local Department of Revenue office at (406)\_\_\_\_\_.

Questionnaire

Description of the Sale

1. Total Sale Price \$ \_\_\_\_\_ Date of Sale \_\_\_\_\_ Cash Down Payment \$ \_\_\_\_\_

Note: This question is to help determine if the financing method affected the sale price and to confirm the sale price reported on the Realty Transfer Certificate.

- > Financing:  
Amount \$ \_\_\_\_\_ Interest Rate \_\_\_\_\_ Term \_\_\_\_\_  
Amount \$ \_\_\_\_\_ Interest Rate \_\_\_\_\_ Term \_\_\_\_\_  
Points Paid by Seller \_\_\_\_\_ Other (Describe) \_\_\_\_\_
- > Source of Financing      ☐Assumable Loan      ☐ VA or FHA Loan  
                                         ☐Conventional Loan      ☐ Contract for Deed      ☐ SBA Loan
- > Did your financing arrangements influence the actual selling of this property?      ☐Yes      ☐No  
(e.g. points or closing costs paid by seller, large down payment on contract for deed)  
If yes, please explain \_\_\_\_\_
- > Was the property advertised as being for sale?      ☐Yes      ☐No
- > Was a trade of property involved in this sale?      ☐Yes      ☐ No  
If Yes, please explain: \_\_\_\_\_ Estimated Value \$ \_\_\_\_\_
- > Was this sale between relatives?      ☐Yes      ☐No  
                                         ☐Yes      ☐No
- > Was this sale between business partners?      ☐Yes      ☐No  
Was this sale between related businesses?      ☐Yes      ☐No  
Was the seller forced to sell this property?      ☐Yes      ☐No      If yes, please explain \_\_\_\_\_
- > Was the buyer forced to buy this property?      ☐Yes      ☐No      If yes, please explain \_\_\_\_\_

2. Describe any personal property items included in the total sales price and give an estimate of their value (e.g. appliances, stoves, refrigerators, satellite dishes, hot tubs, fixtures, etc.)  
Description \_\_\_\_\_ Estimated Value \$ \_\_\_\_\_

3. If any unpaid taxes or assessments were assumed by the buyer please identify them. Indicate the amounts involved and indicate whether they are included in the total sale price or are excluded.  
Description \_\_\_\_\_ Amount \$ \_\_\_\_\_  
Included \_\_\_\_\_ Excluded \_\_\_\_\_

4. What was sold or purchased?    ☐Land Only    ☐Land and Buildings    ☐Mobile Home    ☐Buildings Only  
  
If Mobile Home: Make \_\_\_\_\_ Model \_\_\_\_\_ Year \_\_\_\_\_ Size \_\_\_\_\_  
Serial # \_\_\_\_\_ Title # \_\_\_\_\_

- Please list the following:
- A.      Year Built \_\_\_\_\_
- B.      Land Improvements:      ☐Public Sewer      ☐Septic      ☐Electricity  
                                         ☐Public Water      ☐Well      ☐Gas

5. Have any changes (e.g. additions, remodeling, new structures, damage) been made to the property since the sale?  
☐Yes    ☐ No    If yes, please indicate the changes \_\_\_\_\_

Residential Sales Verification (cont.)

Interior Information

In order to ensure the accuracy of the information we have about your property, please complete this form to the best of your ability. If you need clarifications or explanations about this form, please call your local Department of Revenue office at (406) \_\_\_\_\_.

If your purchase included a residence or other structure, please provide the following information:

Room identification: Please list the number of finished rooms on each level.

	Basement	1st Story	Half-Story	2nd Story	Attic
Living Rooms	_____	_____	_____	_____	_____
Dining Rooms	_____	_____	_____	_____	_____
Family/Den/Rec Rooms	_____	_____	_____	_____	_____
Number of Bedrooms *	_____	_____	_____	_____	_____
Number of Full and ¾ Baths	_____	_____	_____	_____	_____
Number of Half Baths **	_____	_____	_____	_____	_____
Kitchens	_____	_____	_____	_____	_____
Laundry Hookups	_____	_____	_____	_____	_____

\* A bedroom is a room with a closet (including an office with a closet).

\*\* A half bath has only a toilet and sink (no shower).

Finished basement area as a percent of total basement area \_\_\_\_\_ %

Finished attic as a percent of total attic area \_\_\_\_\_ %

Heating/Cooling System:

Heating Type:

Cooling Type:

☐ Gas

☐ Electric

☐ Other (specify)\_\_\_\_\_

☐ Forced Air

☐ Electric Baseboard

☐ Heat Pump

☐ Hot Water Heat

☐ Floor/Wall Heater

☐ Gravity Hot Air

☐ Other (specify)

☐ Central Air

☐ Window Air or Swamp

☐ Wall Unit

Fireplaces: (number of chimneys / openings)

\_\_\_\_\_/\_\_\_\_\_

Masonry

\_\_\_\_\_/\_\_\_\_\_

Metal Prefab or Gas Insert

\_\_\_\_\_/\_\_\_\_\_

Wood Stove or Pellet Stove

Built-in Appliances/ Misc. Features: Do not include moveable appliances.

☐ Dishwasher

☐ Trash Compactor

☐ Countertop Range

☐ Built-in Oven

☐ Refrigerator

☐ Microwave

☐ Other (specify) \_\_\_\_\_

☐ Wet Bar

☐ Central Vacuum

☐ Hot Tub

☐ Garbage Disposal (not floor model)

☐ Oven/Range Combo (drop-in type)

☐ Automatic Garage Door Openers: # \_\_\_\_\_

☐ Intercom

☐ Security System

☐ Spa Bathtub

Other Improvements:

☐ Shed:

☐ Metal

☐ Wood

☐ Enclosed Porch

☐ Attached Garage

☐ Detached Garage

☐ Deck:

☐ Covered

☐ Open

☐ Patio:

☐ Covered

☐ Open

☐ Swimming Pool

Type of Construction:

☐ Vinyl

☐ Concrete

☐ Gunite

☐ Fiberglass

☐ Other

☐ Pole Barn

☐ Barn

☐ Solarium

This property was advertised for sale:

☐ Listed With a Realtor

☐ For Sale by Owner

☐ Other

This property was not advertised for sale:

☐ Private Offer

☐ Other \_\_\_\_\_

If this property was rented, what was the monthly rent? \_\_\_\_\_

This questionnaire was completed by: \_\_\_\_\_

Daytime Phone No.: \_\_\_\_\_ (Please Print)

Signature \_\_\_\_\_ Date \_\_\_\_\_

For Office Use Only

Name of Person Contacted \_\_\_\_\_ Date \_\_\_\_\_

Person Contacted by What Means: 

☐ On-site Visit

☐ Phone

☐ Mail

Signature of Verifier \_\_\_\_\_ Date \_\_\_\_\_

Determination of Sale 

☐ Valid

☐ Invalid

 Give Reason \_\_\_\_\_